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# PERFORMANCE MANAGEMENT:

*Measuring, Managing and Monitoring What Matters*

NCES Winter Forum  
March 2010

Statewide Tools for Teaching Excellence

EDVANCE research

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## Presenters

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Piloting the effectiveness of Performance Management in Education

## STATEWIDE TOOLS FOR TEACHING EXCELLENCE (STTE)

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## Vision for STTE

Create a new conversation about accountability among Texas schools

- Focus attention on a “vital few” set of key strategic goals and outcome measures (Lagging Indicators)
- Provide early warning indicators (Leading Indicators) to enable quick action
- Link indicators to evidence-based interventions
- Monitor interventions implementations by monitoring indicators

*Performance management closes the loop in the continuous improvement cycle!*

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## STTE District Project Teams

- Cross-functional teams (administration, curriculum, IT, special programs, schools)
- High ranking Project Coordinator, and dedicated Data Coordinator

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## Collaborative R&D Process – Phase I

- Conducted baseline assessments of district practices
- Identified key indicators and conducted research to establish links
- Created a database of evidence-based interventions related to indicators

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## Collaborative R&D Process – Phase II

### EDVANCE RESEARCH

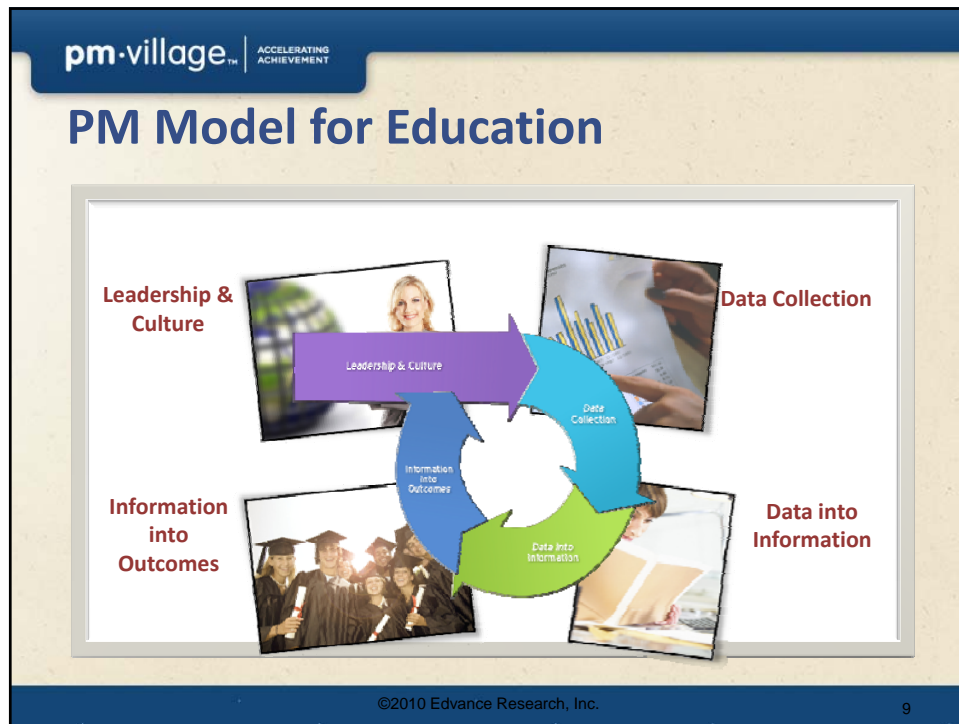
- Defined system requirements and file layout
- Managed development of technology tools
- Developed PM Academy
- Provide technical assistance to districts
- Evaluate efficacy of project

### STTE DISTRICTS

- Established Performance Management Office
- Pilot PM Model and tools to monitor and evaluate selected interventions
- Participate in and redeliver PM Academy modules

MSDF Vision for Performance Management

## A PERFORMANCE MANAGEMENT MODEL FOR EDUCATION



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## Statewide Tools for Teaching Excellence (STTE)

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Identifying metrics that matter

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## Lagging Indicators

Measure performance of a past activity and are not actionable. They occur at the end of the year and are most often used for accountability.



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## STTE Indicators

- ▶ Identified and defined 20 key indicators (9 lagging and 11 leading).
- ▶ Investigated each indicator to validate its utility as an effective measure.
- ▶ Conducted literature reviews to determine inter-relatedness between leading and lagging indicators.
- ▶ Documented relationships and incorporated into system tools.

## STTE Indicators

### ▶ Lagging Indicators

- ▶ Graduation Rate
- ▶ Annual Attendance
- ▶ Mobility
- ▶ Mastery of State Standards
- ▶ Advanced Courses
- ▶ Progress of Prior Year TAKS Failers
- ▶ Grade Retention
- ▶ College Readiness
- ▶ Teacher Turnover

### ▶ Leading Indicators

- ▶ Daily Attendance
- ▶ Early Reading Readiness
- ▶ On Track to Promote (K-8)
- ▶ On Track to Graduate (9-12)
- ▶ Progress to Master of Content
- ▶ Algebra
- ▶ Course Failers
- ▶ Interim Mastery of State Standards



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Measuring, Managing and Monitoring Metrics that Matter

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## A Day in the Life of Joe the Administrator

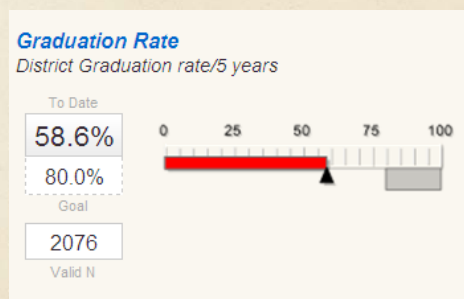
- Joe Smith is the Director of Secondary Programs at ABC ISD
- Joe is part of a district wide performance management team that has evaluated the district's recent end of year performance.
- From looking at lagging data, the team has determined that they need to focus more attention on improving the graduation outcomes for all students in order to continue to meet state and federal accountability requirements.

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## Measuring: Lagging to Leading

- Joe knows from his performance management training that the most effective way to impact lagging data is to intervene on leading indicators
- Joe uses the Indicator tool to further investigate the leading indicators related to the lagging indicator graduation
- He finds that the district is not meeting their goals on credit accrual and grades

## Measuring: Lagging Indicator Data





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## Measuring: Indicator to Intervention

- After identifying the areas of need through a fact-based process, Joe searches for research based interventions
- He searches for interventions that have high effectiveness and levels of evidence ratings as well as ones with high user ratings
- As he narrows the search, he contacts a colleague in another district who has used one of the interventions and he meets with his team to gather feedback

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## Intervention Clearinghouse-Search Results

Search Results for: Click any underlined criteria to remove them.

Lagging Indicator: Graduation  
Related Leading Indicator: Course Failers  
Grade Level: Any

4 Interventions Found. Page 1 of 1. Sort by: Name (A-Z)

**Check & Connect**

Developer: Institute on Community Integration at the University of Minnesota, as a partnership of researchers, practitioners, parents, and students.  
Goal: Check & Connect is a dropout prevention strategy that relies on close monitoring of school performance, as well as mentoring, case management, and other supports.  
Summary: The program has two main components: "Check" and "Connect." The Check component is designed to continually assess student engagement through close monitoring of student performance and progress indicators. The Connect component involves program staff giving individualized attention to students, in partnership with school personnel, family members, and community service providers.  
User Rating: ★★★★★ (0 votes) Effectiveness: ★★★★★ Level of Evidence: ★★★★★  
Frequency: Unspecified Duration: Not Specified

**Financial Incentives for Teen Parents to Stay in School-Specifically LEAP (Ohio) and Cal-Learn (California)**

Developer: Ohio Department of Job and Family Services  
Goal: State welfare programs intended to encourage enrollment, attendance, and completion of high school teen parents through financial incentives as a means of increasing employment and earnings and reducing welfare dependence.

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## Managing: Intervention to Implementation

- After choosing a research based intervention, Joe and his team of campus administrators and teacher leaders develop a well thought out implementation plan
- The intervention is implemented and student progress is measured against established measureable goals
- Teacher fidelity and usability surveys are administered

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## Intervention Implementation Planning

[1\) Plan Name](#)  
[2\) Indicators](#)  
[3\) Monitoring](#)  
[4\) Details](#)  
[5\) Participants](#)  
[6\) Surveying](#)  
[7\) Surveying Fidelity](#)  
[8\) Surveying Usability](#)  
[9\) Analysis](#)  
[10\) Summary](#)  
[11\) Save and Finish](#)

Intervention: Check & Connect [Show Details](#)

**Intervention Implementation Plan Summary**

- Intervention Implementation Plan Name: **Check & Connect**
- Intervention Manager: **Paul Principal**
- What are you trying to achieve?
  - What lagging indicators are you targeting to be changed or impacted by the intervention?  
**Graduation Rate**
  - What leading indicators are you targeting to be changed or impacted by the intervention?  
**Course Failers, On Track to Graduate (9-12)**
  - Do you plan on uploading other data that you would like to include in your interim and final reports? **Yes**
  - What other quantitative (spreadsheets such as tutorial attendance, pre-post tests, RTI probes) data do you want to upload?  
**tutorial attendance**
  - What other qualitative PDFs such as student work, statements) data do you want to upload?  
**student goal statements**
  - How often do you want to upload the other data?
    - Email reminders will be sent to paul@abc.edu
- Details on how you intend to implement the intervention.

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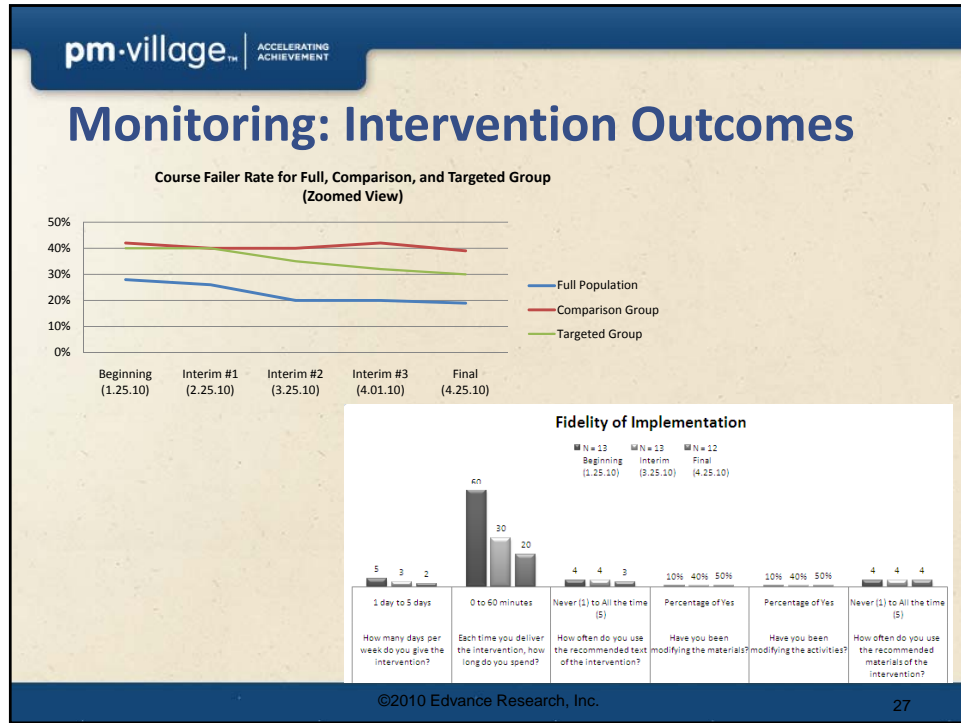
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## Monitoring: Outcomes to Action

- Joe and his team meet to review the intervention outcomes
- Together they decide if the intervention was successful and whether it should be extended or discontinued
- Now they are ready to begin a new iteration of the continuous improvement process by replicating the fact-based diagnosis on the current state of their lagging and leading indicators

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STTE Participant

## CONROE ISD

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## Conroe ISD

- 49,600 students
- 55 campuses
- Located in Montgomery County, TX north of Greater Houston area
- 348 square miles
- Diverse communities
- Strong data systems and technology leadership
- Strong student performance and trying to get better

## Conroe ISD's Involvement

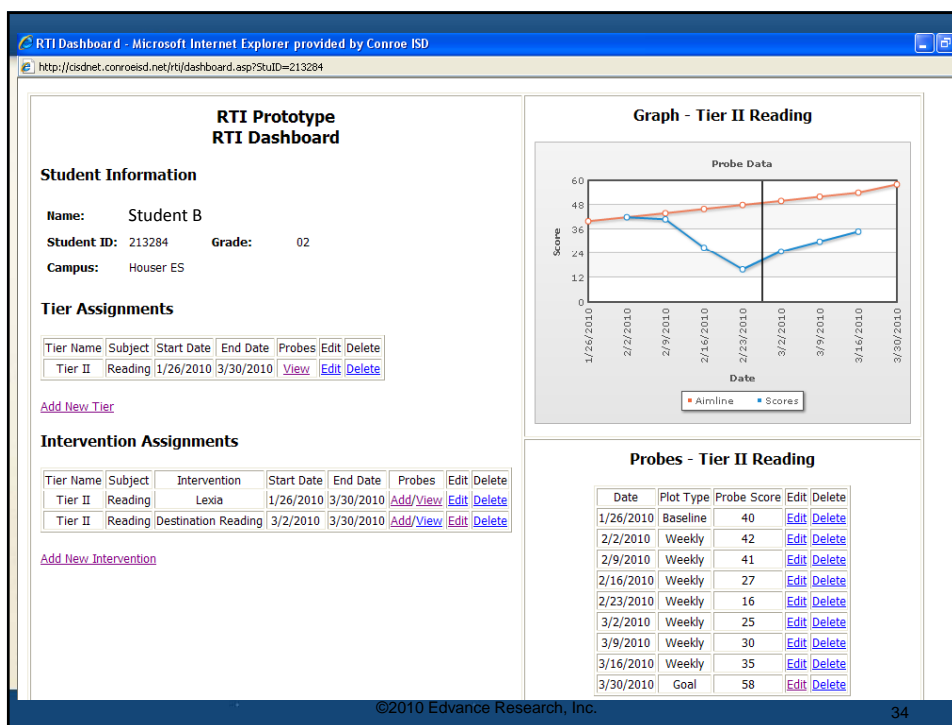
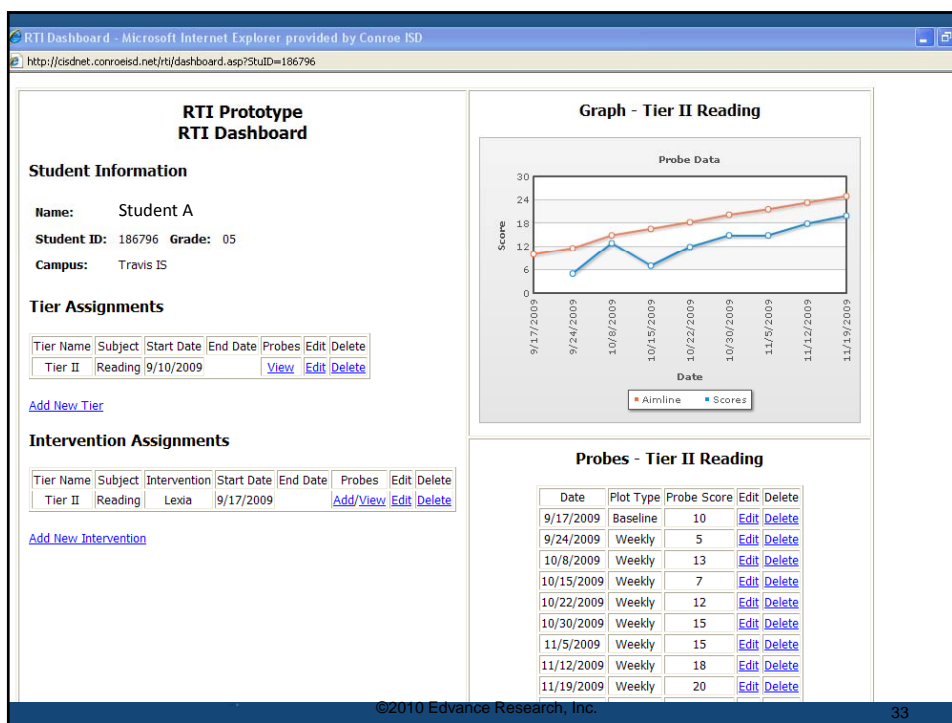
- When we first entered the project, we were unclear of what we were trying to accomplish.
- Over time our goals became more clear.
- We have gained a great deal from the process. We have
  - increased our capacity as an organization
  - expanded our view
  - engaged in meaningful discussions with peers
  - discussed data and student needs among ourselves
  - been able to see what other districts were doing

## CISD Benefits

- The discussion around what metrics are indicators of lagging performance indicators was worthwhile for us as a team.
- This process helped us to visualize better some of the things we were doing as well as trying to accomplish.
- We have been able to move faster than we would have on our own.
- We have come to recognize that lagging indicators will change and so will the leading indicators and our data systems need to fluid.

## Our Project

- We have initiated a Response to Intervention (RtI) program during the past three years.
- Our progress monitoring was being done by hand.
- Our desire is to develop a system for tracking individual student progress as well as intervention effectiveness so that we can make better decisions regarding fidelity and intervention effectiveness.



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**Tier Count by School - Microsoft Internet Explorer provided by Conroe ISD**  
<http://cisdnnet.conroesd.net/rti/tiercount.asp>

**RTI Prototype  
Tier Count by School**

School Name	Math		Reading	
	Tier II	Tier III	Tier II	Tier III
Anderson ES	5	0	4	0
Austin ES	2	1	2	0
Birnam Woods ES	2	0	2	0
Buckalew ES	1	0	0	0
Cryar IS	1	1	0	0
Giesinger ES	1	0	0	0
Houser ES	2	2	1	0
Houston ES	0	0	2	0
Knox JH	1	0	0	0
Lamar ES	4	0	3	0
Milam ES	0	1	14	1
Mitchell IS	1	0	0	0
Moorhead JH	11	0	1	0
Peet JH	3	0	4	0
Reaves ES	2	0	1	0
Rice ES	2	0	0	0
Travis IS	2	0	4	1
Washington JH	0	0	1	0

[Main Menu](#) [Student Search](#) [Log Out](#)

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**Tier History - Microsoft Internet Explorer provided by Conroe ISD**  
<http://cisdnnet.conroesd.net/rti/tierhistory.asp>

**RTI Prototype  
Tier History**

Student Name	School	Grade	Math Current	Math Previous	Math Past	Reading Current	Reading Previous	Reading Past
Student A	Peet JH	07	Tier I	Tier I	Tier I	Tier I	Tier II	Tier I
Student B	Peet JH	07	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
Student C	Peet JH	07	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
Student D	Travis IS	05	Tier I	Tier I	Tier I	Tier I	Tier II	Tier I
Student E	Rice ES	02	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
Student F	Birnam Woods ES	02	Tier I	Tier I	Tier I	Tier I	Tier II	Tier I
Student G	Houser ES	02	Special Ed	Tier III	Tier II	Tier I	Tier I	Tier I
	Travis IS	05	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
	Austin ES	02	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
	Moorhead JH	07	Tier I	Tier II	Tier II	Tier I	Tier I	Tier I
	Mitchell IS	06	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
	Lamar ES	02	Tier I	Tier I	Tier I	Tier I	Tier II	Tier I
	Anderson ES	04	Tier I	Tier II	Tier I	Tier I	Tier II	Tier I
	Anderson ES	01	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
	Travis IS	05	Tier II	Tier I	Tier I	Tier I	Tier I	Tier I
	Anderson ES	03	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I
	Birnam Woods ES	04	Tier I	Tier I	Tier I	Tier I	Tier II	Tier I
	Rice ES	02	Tier I	Tier II	Tier I	Tier I	Tier I	Tier I

Done Internet 100%

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Met Goal by Intervention				
Intervention	Tier Name	Grade	Goal Met	Count
Destination Math				1
	Tier II			1
		2		1
			No	1
Destination Reading				7
	Tier II			7
		2		5
			No	2
			Yes	3
		3		2
			No	2
Lexia				15
	Tier II			14
		2		5
			No	3
			Yes	2

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Benefits	
<ul style="list-style-type: none"> <li>• We are gaining better insight to the student response to interventions because the data is available to all immediately</li> <li>• We are able to analyze the data in a wider and deeper manner which allows us to make connections we would have previously missed</li> <li>• We are thinking through our implementation of interventions in new and meaningful ways</li> </ul>	

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Getting Started with Performance Management

## PM IMPLEMENTATION TIPS

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### PM Implementation Tips

A performance-driven organization:

- #1: Finds truth in numbers.**
- #2: Sets accurate expectations.**
- #3: Anticipates results.**
- #4: Plans with impact.**
- #5: Achieves on-demand visibility.**
- #6: Delivers continuous improvement.**
- #7: Reports with confidence.**
- #8: Executes with conviction.**
- #9: Stands up to scrutiny.**

From The Performance Management Revolution by Howard Dresner.

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## PM Implementation Tips

- Secure superintendent endorsement & support
- Start with clear vision to be achieved in 1-3 years
- Prioritize based on benefit vs. cost, complexity to time
- Don't try to fix everything at once
- Avoid "big bang" approaches
- Look for a "quick win"
- Adopt a continuous improvement approach
- Allow vision to evolve with the growth and evolution on the district

## Presenters

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